Hargreaves Lansdown is a trading name of Hargreaves Lansdown Asset Management Limited (a wholly-owned subsidiary of Hargreaves Lansdown plc), authorised and regulated by the Financial Conduct Authority. The company is registered in England and Wales with company number 01896481, with its registered office at the address shown.

Retirement Capital
Pension Practitioner Venture Wales
Merthyr Tydfil Industrial Park
Pentrebach
Merthyr Tydfil
Mid Glamorgan
CF48 4DR

## HARGREAVES LANSDOWN

SIPP Transfers

One College Square South Anchor Road Bristol BS1 5HL

Telephone: 0117 980 9926 www.hl.co.uk

> 25 February 2022 Our Ref: 1997649

## **URGENT**

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Retirement Capital NB869307C Member: Mrs M Baker , 4 Steadings Rise Knutsford Cheshire WA16 0WB Transferring into: HL SIPP (PSTR – 00616238RC)

Please find attached a letter of authority to enable our client to transfer the above policy to the HL SIPP. I would be grateful if you could send the necessary transfer out details to enable this to proceed.

What we require from you (please email where possible):

Discharge Forms
Details of current scheme, including values
Details of any safeguarded benefits including the below*

\*Please note the HL SIPP cannot automatically accept transfers from the following schemes:

- AVCs linked to a Defined Benefit scheme, where the AVC can provide some or all of the main scheme Tax
  Free Cash entitlement
- Money Purchase schemes or Section 32 plans with an underpin or containing GMP or 9(2B) rights
- Cash Balance schemes

If you do not provide this information we will have to contact you again to confirm it.

Additionally, please advise us if either the pension has been crystallised in full or part or if there is a court order attached to the plan.

If you have any further queries on this matter, or any other, please do not he sitate to contact me on 0117 980 9891 or at  $\underline{\text{sipptransfers@hl.co.uk}}$ 

Yours faithfully,

SIPP Transfer Management Team Hargreaves Lansdown

## 6. Transfer to the HL SIPP. Leave blank if you're not transferring a pension

## Transfer to the HL SIPP. Leave blank if you're not transferring a pension

- Transfer your pension as cash your provider will sell your investments, then transfer the cash amount. You will not be invested during the transfer, so will not make gains or losses. Once your transfer is complete you'll be able to buy investments. This type of transfer usually takes 2-4 weeks depending on your provider.
- Transfer your pension investments all your investments and cash will be transferred. You will be invested during the transfer, so you could make gains or losses. Usually you cannot trade until your transfer is complete.

This type of transfer usually takes 6-8 weeks, depending on your investments and provider. If you select this option we will convert any funds transferred to the lowest cost version we offer. We will never convert you into a fund that's more expensive than the one you already hold. There are no charges or tax to pay. Before transferring please read about converting funds at www.hl.co.uk/convert.

We'll contact you to cover your options if your provider cannot transfer your pension investments or you hold an investment we do not offer.

gains or losses. Osdany you can							
Your details Surname: BAKE2							
Title (Mr. Mrs, etc): MRS  First name(s): MAR	CIA CAROLINÉ	Postco	de: 2	Nationality:	И		
Address: 4 SIEAPINGS Q	ISE MERE	iu A	16 0 W D	Tick here if you			
Date of birth:    National Insurance No.							
Pension details							
Transfer your pension as cash Trans	sfer your pension investments			Policy number:			
Pension PGB PENSION SCHEME							
Approx. value of funds in drawdown £	not in drawdow	Approx. value of funds 170,000 Tick if partial transfer not in drawdown £ 70,000 Tick if this is a drawdown policy					
Pension type: CS AS PENSIO	ON SCHEME						
Pension type: SSAS PENSION SCHEME e.g. Stakeholder  Pension type: SSAS PENSION SCHEME							
Name and address  Of administrator:  Bullping  PENTRE BACK, MERTHYR TYDITE  transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transfer and I will seek personal financial advice if I am unsure transferring is right for transferring in the I am unsure transferring is right for the I am unsure transferring is righ							
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wish to transfer the policy listed above. • l authorise the current prompter by the Common Transfer Declaration.							
<ul> <li>I have read, understood and agree to the Common Transfer Declaration.</li> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to</li> </ul> <ul> <li>Hargreaves Lansdown has not given me advice; I am responsible for my decision to</li> </ul>							
Please I Bales Date: 2 2 2 2							
7. Would you like to choose your inv		his step if vo	ou'd like to choose yo	ur investments later			
7. Would you like to choose your int	estments now: Ignore t		Transfer	Lump sum	Monthly saving (min. £25 per investment)		
Investm Full fund/	ent choice Vantage		(min. £100 per fund)	(min. £100 per fund)			
	2 4 FFR 2022		%	£	£		
	LAFED LULL		%	£	£		
			%	£	£		
If you'd like to choose more investments please let us know on a separate sheet.					E		
	e let us know on a separate sheet.	Cash	%	£	t		
Reinvest income automatically		Total	100%	£	E		
Hold income as cash in your SIPP		TOLEI	100%				
8. Declaration – please remember to include your cheque (if applicable)							
For your own benefit and protection you should read our Terms and Conditions carefully before committing and any other Registered Pension Scheme where I am and any other Registered Pension Scheme where I am Ltd, in writing, within 30 days if I cease to be a Ltd, in writing, within 30 days if I cease to be a							
to an investment. If you do not understand a	der Section 188	on 188 of the Finance Act UK resident.  her of: UK resident.  I confirm that I have not received advice from HL					
please ask us for further information. When services we will take this as acceptance and		The basis amount (currently 53, 600) or regarding the merits of entering into, or the suitability			ring into, or the suitability		
of our terms, and you will be bound by them.	<ul> <li>100% of my Relev</li> </ul>	<ul> <li>100% of my Relevant UK Earnings (within the</li> </ul>			of any aspect of, the HL SIPP unless that aspect has		
I confirm I am applying to join the HL SIPP. I ha	ve meaning of section	meaning of section 189 of the Finance Act 2004) for that			been covered under a separate agreement for individual advice from a Hargreaves Lansdown Financial Adviser. If		
read in full, agreed to and retained:		tax year. This declaration and the particulars given in this			I have any doubts I will seek personal advice, in particular		

- The Key Features of the HL SIPP, Important Investment Notes and Contribution and Transfer Checklists.
- Key (Investor) Information Document of my chosen investments (where available), and all costs and charges, provided to me at www.hl.co.uk or on paper.

I agree to be bound by the Scheme Rules, and acknowledge that these have been made available to me by HL.

I confirm that I will be a relevant UK individual in any tax year in which personal contributions are paid. I declare

This declaration and the particulars given in this application are, to the best of my knowledge and belief, correct and complete.

If an event occurs which means that I will no longer be entitled to tax relief under Section 188 of the Finance Act 2004, I will inform Hargreaves Lansdown Asset Management by 5th April of the tax year in which the event occurs or 30 days after the event if later. If I make a contribution, of which part or all is not eligible for tax relief, I will notify you separately on or before the date of the contribution.

regarding the merits of the various pension options I may have available to me now and in the future.

By signing this declaration I am allowing HL to process my application using the information that I have provided. This declaration and any other declaration made by me in connection with this application shall be the basis of the contract between me and Hargreaves Lansdown Asset Management Ltd.

False Statements – It is a serious offence to make false statements; the penalties are severe and could lead to prosecution.